

Chapter 1

Entering Information Inquiry (Contact) Data

Chapter Overview

Introduction

This chapter explains the process of entering information inquiry (contact) data that may or may not lead to a complaint record. For example, an employee comes into your office to discuss an event that has occurred, but is not submitting anything formal at this time.

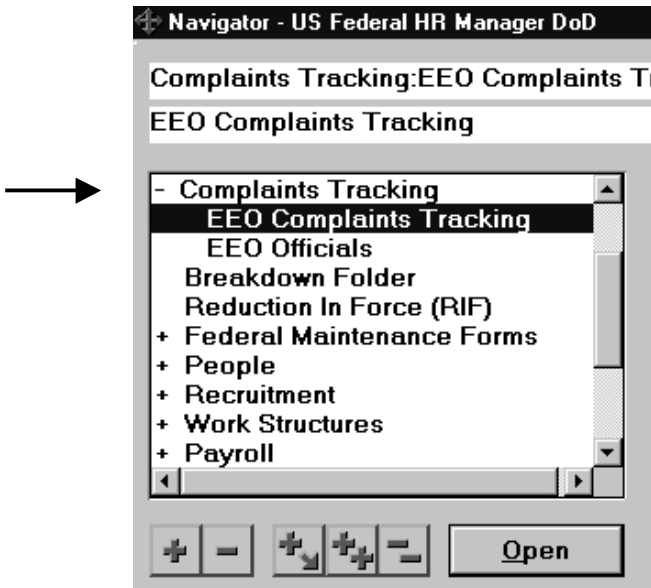
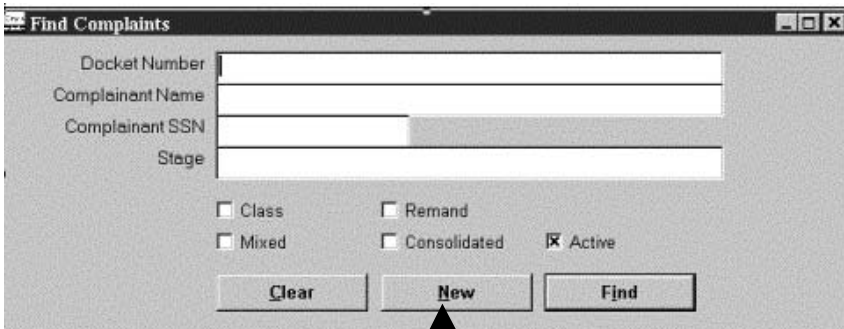
This process is a means of storing data on all contacts and saves time. If the employee comes back to pursue further action, the record can easily be queried and updated to the pre-complaint or formal complaint stage.

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Entering Information Inquiry (Contact) Data


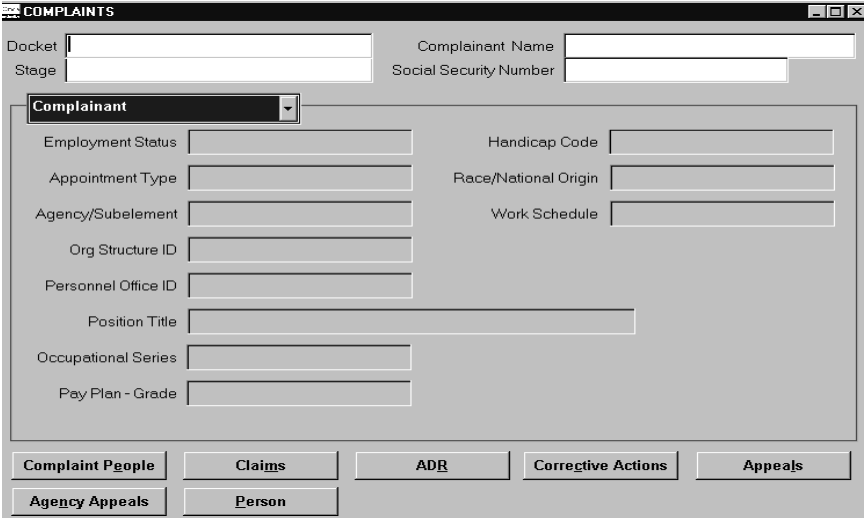

Accessing the Find Complaints Window

Step	Action
1	<p>On the Navigation List, click <i>Complaints Tracking</i> → <i>EEO Complaints Tracking</i> → <OK>.</p> 
2	<p>The Find Complaints Window displays.</p>  <p>Click <New>. The Complaints Window displays.</p>

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Entering Information Inquiry (Contact) Data, Continued

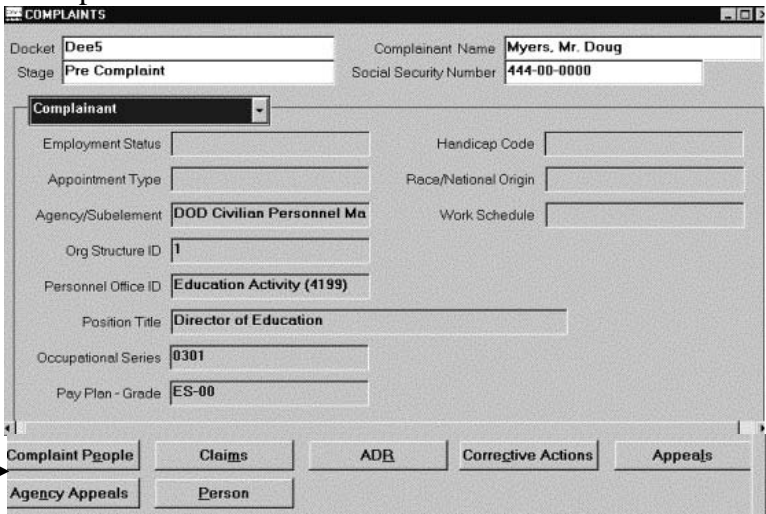
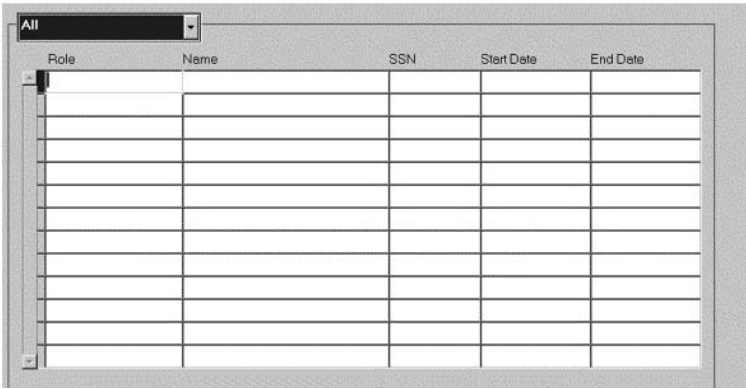
Completing the Complaints Window

Step	Action
1	<p>On the Complaints Window, complete the header information:</p> <div data-bbox="266 569 418 646" style="border: 1px solid black; padding: 5px; display: inline-block;">Header</div>  
2	In the <i>Docket</i> data field, input a unique Component number, if not automatically generated.
3	In the <i>Stage</i> data field, use the LOV to select “Other.”
4	<p>In the <i>Complainant Name</i> data field, use the LOV to select the person’s name. On the Enter Reduction Criteria for Long List message box, enter:</p> <ul style="list-style-type: none"> • % sign for a list of all the names in the database; or • The first letter of the last name with a % sign. For example, “A%” displays the names that begin with an “A.” <p> The <i>Social Security Number</i> data field auto-populates.</p> <p>Note: If the person is not in your database, you must return to the Navigation List and select <i>EEO Officials</i> to build a limited person record so the name will display in the LOV. See Chapter 2, <i>Entering Information on People Not In Your Database</i>, in this module.</p>

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Entering Information Inquiry (Contact) Data, Continued

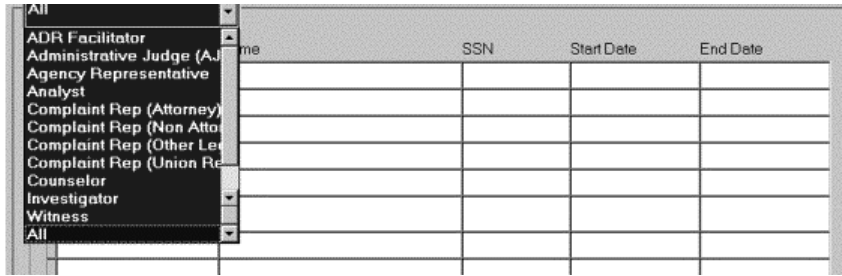

Completing the Complainant Region

Step	Action
1	<p>Once you select a name, the Complainant Alternate Region automatically populates with existing information.</p> <p>♦ Example:</p>  <p>The screenshot shows a web form titled 'COMPLAINTS'. It has fields for 'Docket' (Dee5), 'Stage' (Pre Complaint), 'Complainant Name' (Myers, Mr. Doug), and 'Social Security Number' (444-00-0000). Below these is a 'Complainant' dropdown menu. The form is divided into two columns of input fields: Employment Status, Appointment Type, Agency/Subelement (DOD Civilian Personnel Ma), Org Structure ID (1), Personnel Office ID (Education Activity (4199)), Position Title (Director of Education), Occupational Series (0301), and Pay Plan - Grade (ES-00). At the bottom, there are taskflow buttons: Complaint People, Claims, ADR, Corrective Actions, Appeals, Agency Appeals, and Person. Arrows from the 'Complainant Region' and 'Taskflow Buttons' labels point to the 'Complainant' dropdown and the 'Complaint People' button respectively.</p>
2	<p>Click the <Complaint People> Taskflow Button. The Complaint People Window displays.</p>  <p>The screenshot shows a window titled 'Complaint People'. It has a dropdown menu set to 'All'. Below is a table with the following columns: Role, Name, SSN, Start Date, and End Date. The table is currently empty.</p>

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Entering Information Inquiry (Contact) Data, Continued



Completing the Complainant Region (continued)

Step	Action
3	<p>With the Role Column highlighted, use your cursor and click the drop-down menu next to the All Alternate Region, scroll down to view list the roles of a person associated with the complaint, i.e., Investigator, Witness, Counselor, etc.</p> 
4	Select a role, e.g., Witness.
5	The role displays in the Role data field.
6	In the Name data field, select the name from the LOV if the person is in the database. If not, follow the steps in Chap 2, Entering Information on People Outside your Database, in this module.
7	The Taskflow Buttons are not used with the process of entering information inquiry (contact) data.
	<p>NOTE: Until Phase II is fielded, you will need to enter the information inquiry (contact) data using the Paper Clip Icon on the Toolbar (Attachment). Review Module 1, Fundamentals of the Modern DCPDS, Chapter 3, Navigating the Modern DCPDS for additional information.</p>

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Entering Information Inquiry (Contact) Data, Continued

Completing the Complainant Region (continued)



Step	Action
8	Click the Save Icon  on the Toolbar.
9	<p>To Exit the record:</p> <p>Click Action on the Toolbar → Close Window or Close Form (to return to the Navigation List).</p> <p><i>Or</i></p> <p>Click Action → Exit Oracle Applications to close out of Oracle and return to the Desktop.</p> <p><i>Or</i></p> <p>Click the "X" in the upper right-hand corner of the window or the small red Oracle Icon in the upper left-hand corner of the window.</p> <p> Note: The record is now ready for querying and updating to a pre-complaint or formal complaint stage.</p>

Attaching a Document (Customized for CATS)

Purpose

This section guides you through the steps to attach, view, print, and delete an attachment to a complaint record.


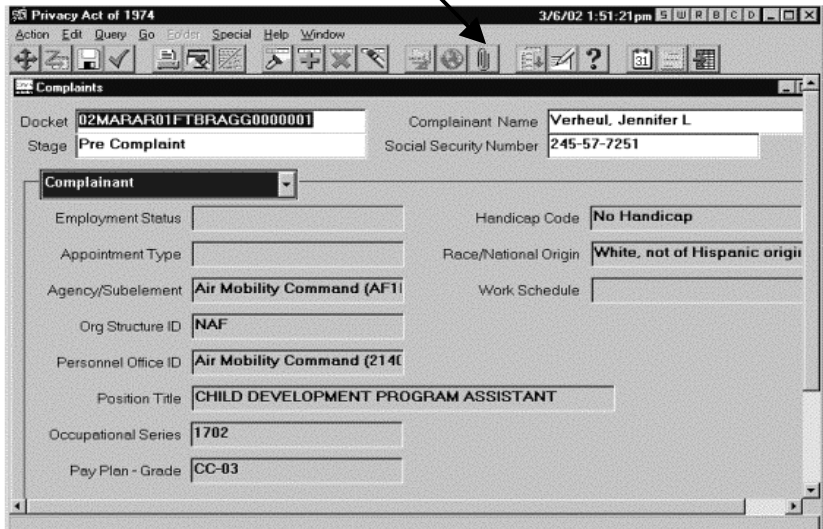
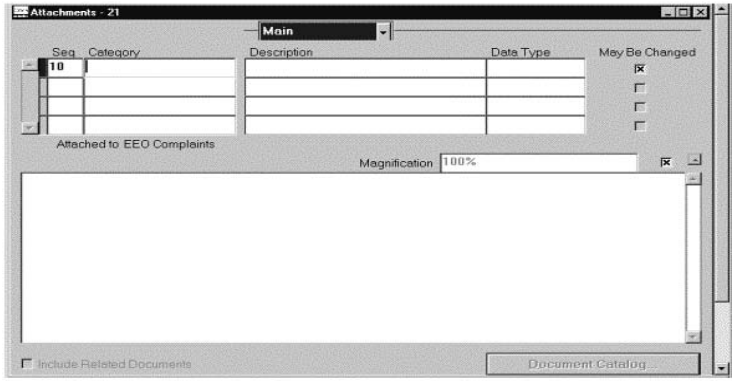
Before You Begin

- You can attach short comments, word documents, images, video, OLE objects, or Web pages to many records. For example, you can attach your notes while capturing Complaints Action Tracking (CATS). When the **Attachments** button  is enabled, it is a solid paper clip.
- The paper clip changes to a paper clip holding a paper  after an attachment has been added to a record. The bottom half is white.
- Each record can have one or more attachments.
- You can copy attachments from one record to another.
- You can store the attachments in the database or in your file system in the Document Catalog.
- Follow this path to access the CATS **Complaints** Window:
 - **Navigation List** → *Complaints Tracking* → *EEO Complaints Tracking* → **<Open>**.
 - The **Find Complaints** Window displays. Click **<Find>**. This will query all complaint records to which you have access.
 - The **Complaints** Window displays with the first complaint record in the database displayed.
 - Use the Up and Down Arrow Keys to scroll to the record you need to add an attachment.

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Attaching a Document (Customized for CATS), Continued


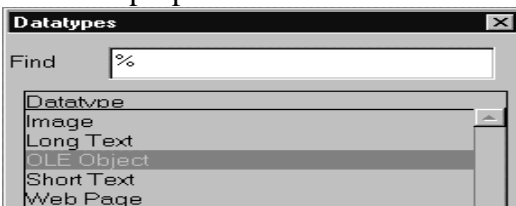
Attaching a Document

Step	Action
1	<p>On the Complaints Window, click the Attachments  button on the Toolbar.</p> 
2	<p>The Attachments Window displays. The <i>Seq</i> number is system-generated. The drop-down menu at the top displays <i>Main</i> or <i>Source</i> which are alternative regions that give you more options/segments to determine what kind of attachment you have.</p> <p>With your cursor in the <i>Category</i> data field, click the LOV.</p> 

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Attaching a Document (Customized for CATS), Continued

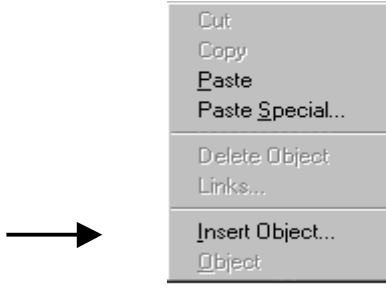
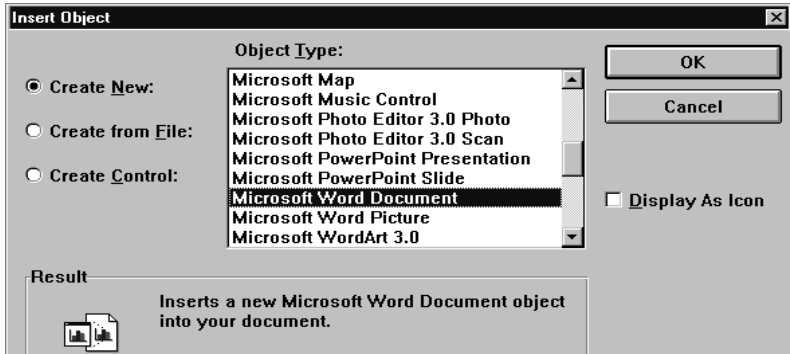
Attaching a Document

Step	Action												
3	<p>The Categories Window displays. Select <i>Comments</i> or <i>Miscellaneous</i> and click <OK>. <i>Comments</i> have been selected for illustration purposes.</p> 												
4	<p>In the Description data field, type the information you want to attach, such as the name of a word document. This is a free flow text field of 255 characters. [Tab] to the Data Type data field.</p>												
5	<p>With your cursor in the Data Type data field, click the LOV. Select the format for your data and click <OK>. OLE Object is selected for illustrative purposes.</p>  <p>You can select any of the data types listed:</p> <table> <tr> <th>Data Type</th><th>Description</th></tr> <tr> <td>Image</td><td>Places a picture in the text area.</td></tr> <tr> <td>Long Text</td><td>Used when <i>Comments</i> is selected and stores up to 2000 characters of text.</td></tr> <tr> <td>OLE Object</td><td>Represents a document – word, power point, etc. in the text area.</td></tr> <tr> <td>Short Text</td><td>Contains less than 2000 characters of test.</td></tr> <tr> <td>Web Page</td><td>A URL reference that you can view with your Web browser. You must define your Web browser to view a Web page attachment.</td></tr> </table>	Data Type	Description	Image	Places a picture in the text area.	Long Text	Used when <i>Comments</i> is selected and stores up to 2000 characters of text.	OLE Object	Represents a document – word, power point, etc. in the text area.	Short Text	Contains less than 2000 characters of test.	Web Page	A URL reference that you can view with your Web browser. You must define your Web browser to view a Web page attachment.
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Attaching a Document (Customized for CATS), Continued

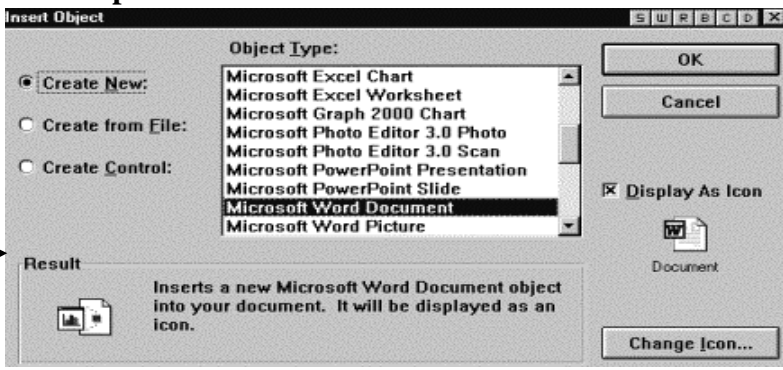
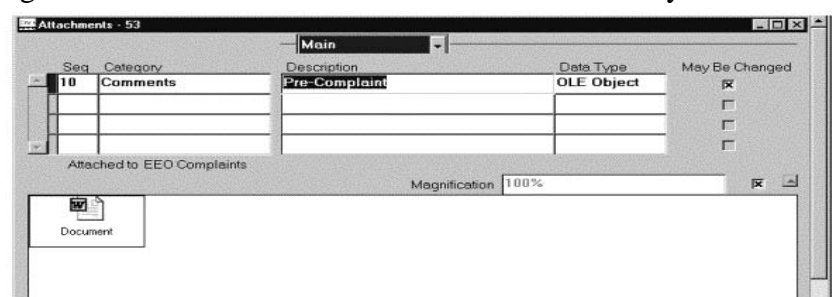
Attaching a Document

Step	Action
6	<p>Place your cursor in the large white area below “Attached to EEO Complaints” and Right click your mouse to display a drop down menu. Click <u>I</u>nsert Object...</p> 
7	<p>The Insert Object Window displays. This window gives you options on the types of objects you can insert as attachments.</p>  <p>You can select attachment information for insertion into the text area by clicking one of the three buttons:</p> <ul style="list-style-type: none"> • Click Create <u>N</u>ew to create a new object document that you can create in the text area. • Click Create from <u>F</u>ile to insert a file document in the text area of the Attachment Window. • Click Create <u>C</u>ontrol to create a control document attachment.

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Attaching a Document (Customized for CATS), Continued

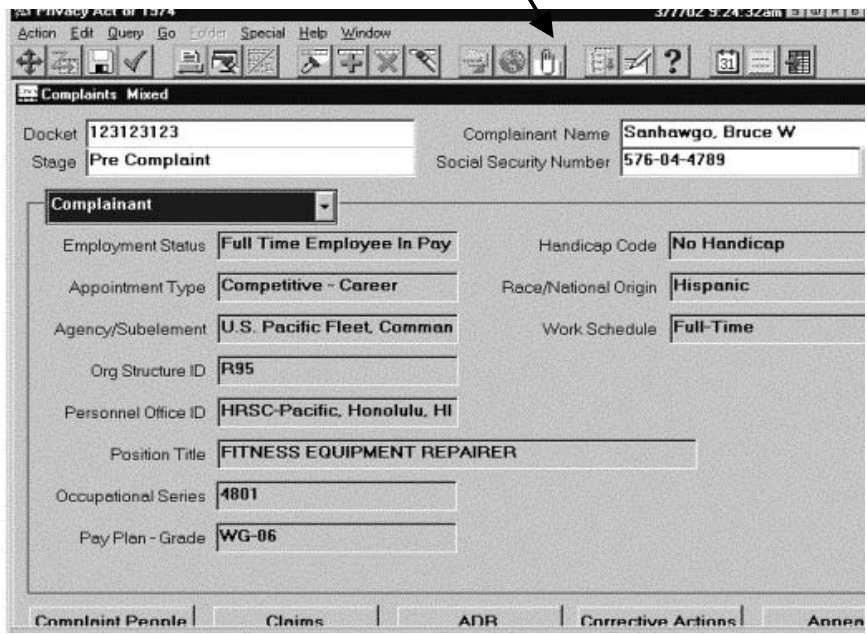
Attaching a Document

Step	Action
8	Select Create New . Check the Display As Icon check box. If you do not select the check box, the entire document displays in the text area.
9	<p>In the Object Type Column, scroll down and select Microsoft Word Document. Click <OK>.</p> <p>♦ Example:</p> 
10	A blank screen displays. Type in your notes and save.
11	<p>Exit the screen (File/Exit). The Attachment Window displays again with the Word Icon. Click it to view the text you entered.</p>  <p>The check boxes next to the Data Type column indicate if the data “may be changed” when the boxes are selected.</p> <p>Note: Multiple data types can be inserted into the text area as attachments for the document being processed.</p>
12	Exit the Attachments Window. The Complaints Window displays, but does not show the Paper Clip with a white paper.

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Attaching a Document (Customized for CATS), Continued

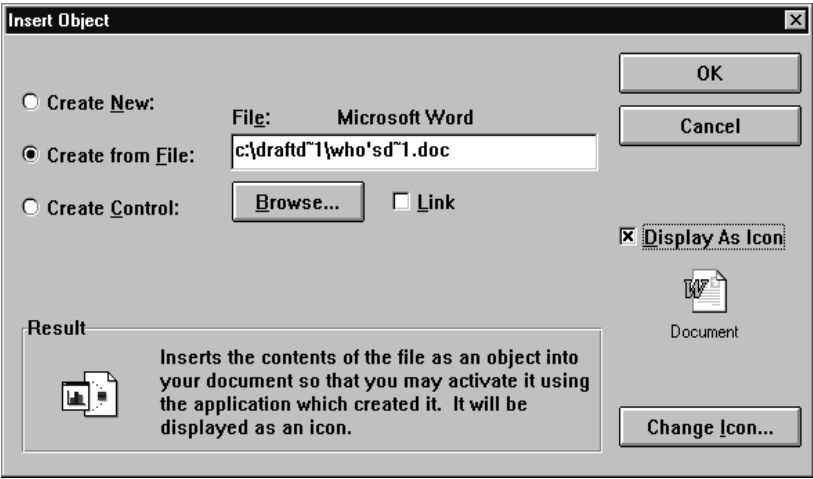
Reviewing Your Attachment

Step	Action
1	Exit the Complaints Window and return to the Navigation List .
2	<p>Access the Complaints Window again.</p> <ul style="list-style-type: none"> • Navigation List → <i>Complaints Tracking</i> → <i>EEO Complaints Tracking</i> → <Open>. • The Find Complaints Window displays. Click <Find>. • The Complaints Window displays with the first complaint record in the database displayed. <p>Use the Up and Down Arrow Keys to scroll to the record you added an attachment to</p>
3	<p>The Complaints Window displays the Paper Clip with the white paper (bottom half of Paper Clip is shaded) indicating there is an attachment:</p>  <p>The screenshot shows a software window titled 'Complaints Mixed'. It has a menu bar (Action, Edit, Query, Go, Editor, Special, Help, Window) and a toolbar with various icons. A paper clip icon is highlighted with an arrow. Below the toolbar, there are fields for 'Docket' (123123123), 'Complainant Name' (Sanhawgo, Bruce W), 'Stage' (Pre Complaint), and 'Social Security Number' (576-04-4789). A 'Complainant' dropdown menu is open, showing a list of complainants. Below this, there are several fields for employee information: 'Employment Status' (Full Time Employee In Pay), 'Appointment Type' (Competitive - Career), 'Agency/Subelement' (U.S. Pacific Fleet, Comm), 'Org Structure ID' (R95), 'Personnel Office ID' (HRSC-Pacific, Honolulu, HI), 'Position Title' (FITNESS EQUIPMENT REPAIRER), 'Occupational Series' (4801), and 'Pay Plan - Grade' (WG-06). At the bottom, there are tabs for 'Complaint People', 'Claims', 'ADR', 'Corrective Actions', and 'Appeals'.</p>
4	Click the Paper Clip to review your attachment notes.
5	Exit.

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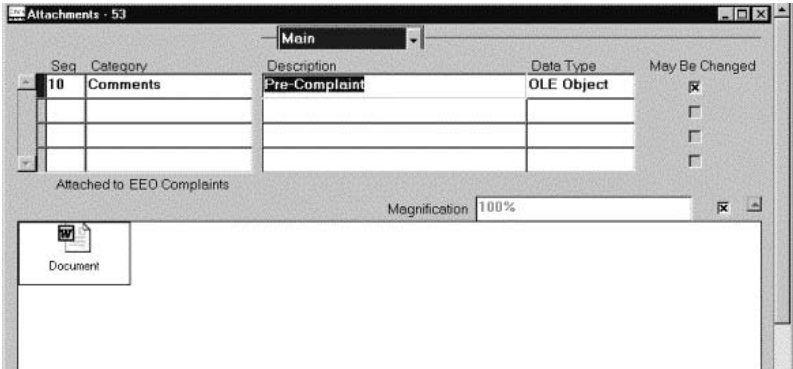
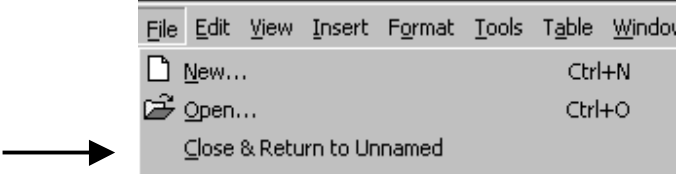
Attaching a Document (Customized for CATS), Continued

Attaching a File

Step	Action
1	<p>If you want to attach a document from your database:</p> <ul style="list-style-type: none"> On the Insert Object Window, check Create from File. Click <Browse> to select the drive, directory, and file you want to use as an attachment, just as you would in Microsoft Word, Excel or PowerPoint files. <p>Then click the Link checkbox to “link” the attachment.</p>  <p>The Result Region explains the functionality of the button.</p>
2	<p>Select the checkbox next to Display As Icon to display the document icon in the text area of the Attachment Window. If you do not select the checkbox, the entire document displays in the text area.</p> <p><Change Icon...> changes the “Word Document” icon image to another icon image.</p>
3	Click < O K>.


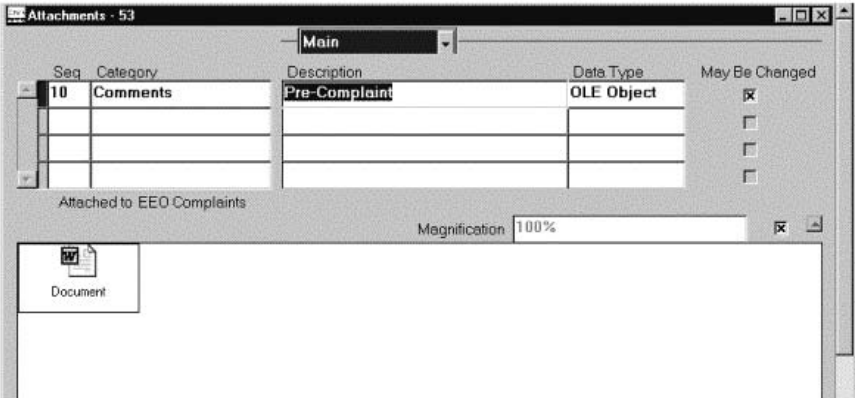

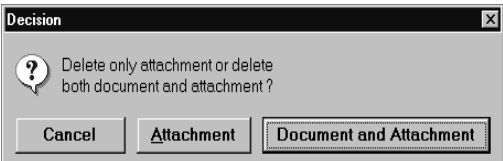
Viewing and Printing the Attachment

Viewing and Printing

Step	Action
1	<p>To view the attachment(s) to a record, open the record, e.g., a complaint record, and click the Attachment button on the Toolbar.</p>  <p>Attachment Button Highlighted</p> <p> Note: The shading on the bottom half of the button indicates there is an attachment.</p>
2	<p>The Attachments Window displays. Use the left scroll bar to locate the Seq and Category you need to view and print. Double-click the icon or text attachment in the text area. The attachment displays for viewing.</p> 
3	<p>To print, double click the icon in the text area to open, then click print on the menu and follow the printing instructions.</p>
4	<p>To close the document, click File on the Menu Bar. Click Close & Return to Unnamed to return to the Attachments Window.</p> 

Deleting an Attachment

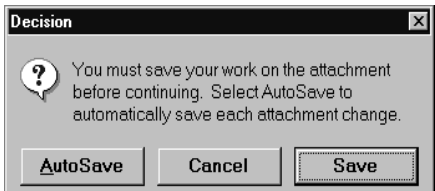
Deleting an Attachment

Step	Action
1	After selecting the action which has an attachment you want to delete, click the Attachment  button on the Toolbar.
2	<p>The Attachments Window displays. Use the left scroll bar to select the Seq number you want to delete in the Attachments Window.</p>  <p>Click the Delete Record  button on the Toolbar.</p>
3	<p>A Message Box displays and asks, “Delete only attachment or delete both document and attachment?”</p> <p>Click <Attachment> or <Document and Attachment>.</p> 

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Deleting an Attachment, Continued

Deleting an Attachment

Step	Action
4	<p>A second Message Box displays and states, “You must save your work on the attachment before continuing. Select AutoSave to automatically save each attachment change.”</p> <p>Click <<u>A</u>utoSave> or <S>ave> and exit the window.</p> 

Copying an Attachment from Another Record

Copying an Attachment

Step	Action
1	Query the record that you want to attach a document. Do NOT query the record that already has the attachment.
2	With the record open, click <Attachments> on the Toolbar. The Attachments Window displays.
3	Click <Document Catalog>. The Document Catalog Window displays. With your cursor in the <i>Attached To</i> data field, click the LOV and select the application object or enter the query criteria for the one you need.
4	Click <Find>. Check one or more documents and click <OK>.
5	Click <Attach 1>.
6	Click Save on the Toolbar  .

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